

**EEMUG 2020**



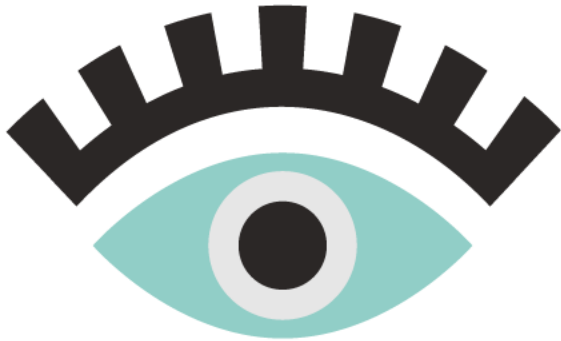
**#EEMUG2020**





# The Road Ahead

*Beyond Version 17.0*



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**#EEMUG2020**

# Beyond Version 17.0

**Continuous Code Release – new features monthly  
starting in September 2020**

TENTATIVE AND SUBJECT TO CHANGE

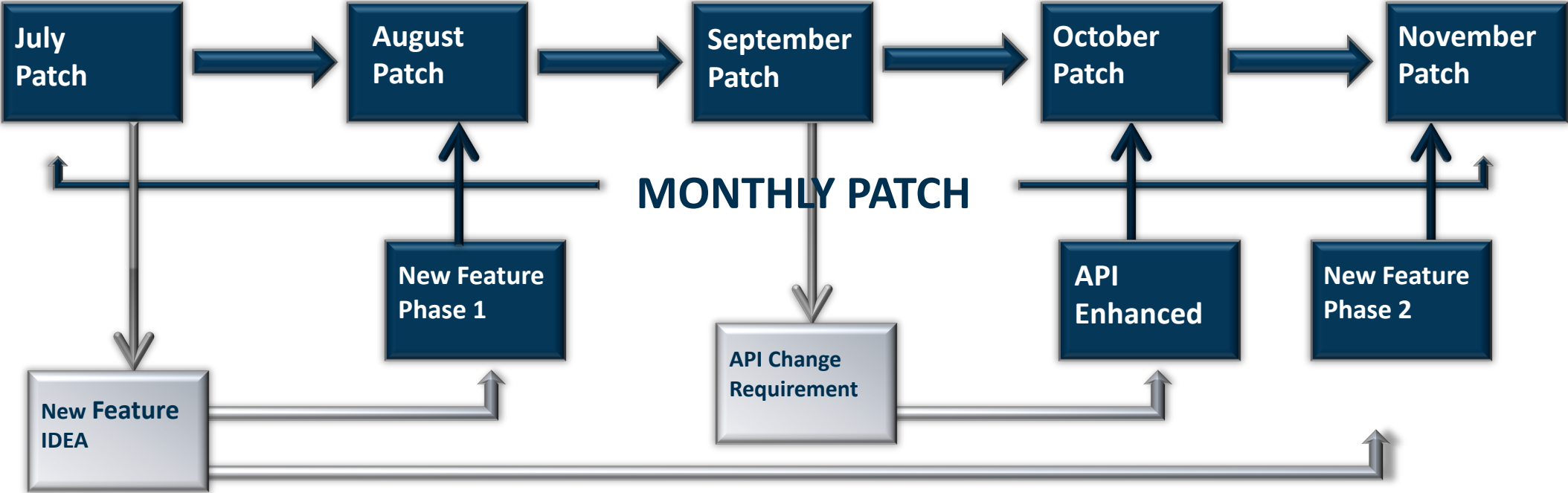


# What this means...

## Monthly Updates –

- Continuous code delivery
- Can include more than just bug fixes
- Work closely with client to manage scope and identify MVP
- Deliver small wins in a shorter timeframe
- Larger enhancements released in phases
- API enhancements, transmittal changes, third party integrations that don't require extensive UI, cross-publication reporting

# Development Schedule



# Release Schedule

Two more major releases:

- 16.1 in beta now, early release January 2020
- 17.0 in development now, beta April/May 2020\*
- 17.0+ continuous code delivery – monthly updates

\*partial continuous code delivery

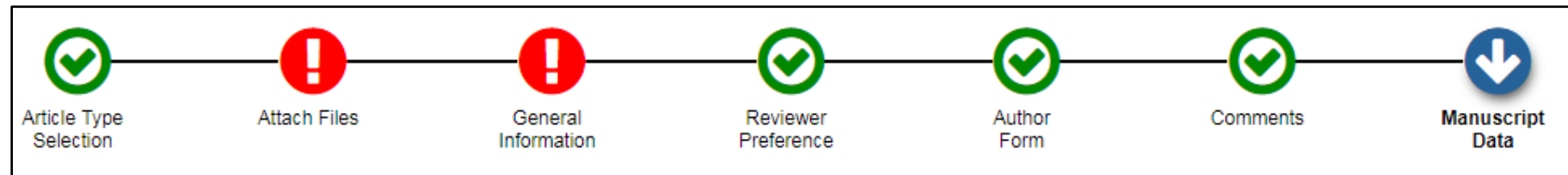
# User Interface and User Experience

UI – modernize the look of EM & PM

UX – guide the user, “what do I do next”, “what needs my attention”

**Edit Submission**

- ✓
- ✓
- ✓
- ➔
- ✓
- ✓
- ✓
- ✓
- ✓
- ✓
- ✓
- 
- ✓
- ✓
- ✓

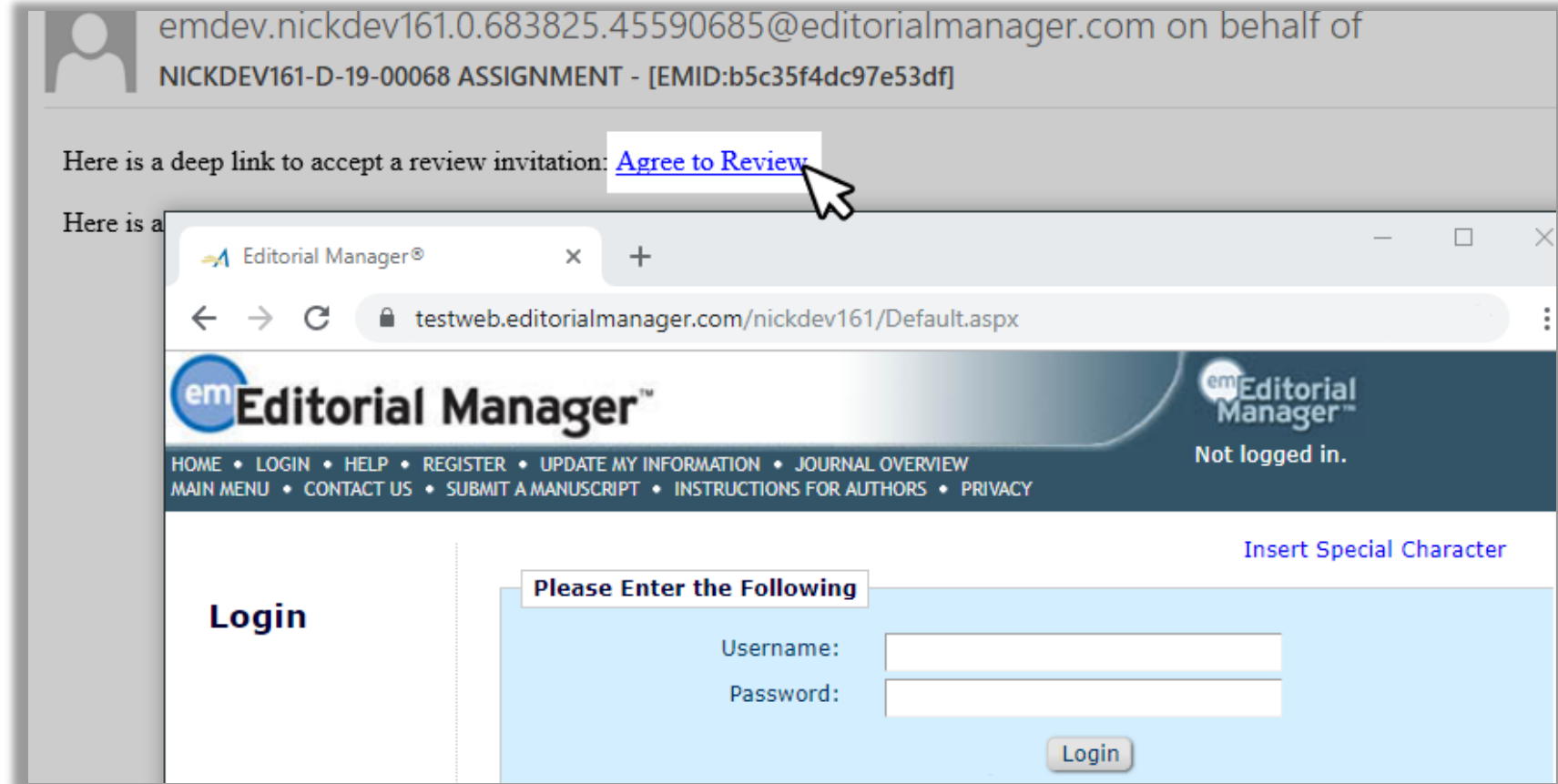




# Deep Link Login Requirement

Security concerns have been expressed with carrying out a full login when a user clicks a deep link in an email.

A new deep link shielding configuration requires the user to log in before granting access to EM via any full login deep link.



# APD Field List Response Options

The current List option for Additional People Detail fields only allows single-value selection dropdown lists.

New functionality will allow users to select more than one value when working with APDs:

- Drop-down list (currently the only list type on the APD interface)
- Radio Buttons
- Checkboxes
- Scrolling Selector

Please confirm the following very important information:

Given/First Name: **Liu**  
Family/Last Name: **Kang**  
Username: **liukang**  
E-mail Address: **liu\_kang@midwaygames.com**  
Country or Region: **UNITED STATES**

---

If you have not yet registered, please go to the [New Member Registration](#) page to apply for membership.

I have registered for the [Society Membership Site](#).

Please click on the privacy policy links below and then check the box.

\* I have read and accept the [Publisher's Data Use Privacy Policy](#) and the [Aries Privacy Policy](#).

---

New Registration APD

Checkboxes for APD

q1  
 q2  
 q3  
 q4

[Select All](#) [Clear All](#)

Scrolling List for APD

11  
12  
13  
14

[Select All](#) [Clear All](#)

# Simplify Submission Process

“Xtract” simplifies the submission process by automatically extracting metadata – title, abstract, authors & affiliations, and keyword.

Some publications want to further simplify the process for authors, particularly at initial submission, opting to ask for detailed data at revision.

The requirement that the submitting author review and fix/complete co-author data can be onerous.

**Solution: Disable the co-author extract and leave co-author fields empty.**

# Simplify Submission Process

- Disable extraction of Co-Author metadata entirely
- Extract Co-Author metadata for new submissions, but not for revisions
- Extract Co-Author metadata for both new and revised submissions

**Submission Item Parameters:**

Primary Manuscript File:

*Select a Submission Item Type to be assigned to the file uploaded at the initial step of the Attach File process. The selected Submission Item Type will be automatically configured as follows (in the settings below): Required for Submission - Required. Allow Offline Submission - Hidden.*

	New Submission	Revised Submission
	<input type="text" value="None"/>	<input type="text" value="None"/>
<input type="checkbox"/> Exclude PDFs from metadata extraction	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Do not extract Co-Author metadata	<input type="checkbox"/>	<input type="checkbox"/>

**Abstract**

	New Submission	Revised Submission
Required for Submission:	<input type="text" value="Required"/>	<input type="text" value="Required"/>
Allow Offline Submission:	<input type="text" value="Optional"/>	<input type="text" value="Optional"/>

Exclude from Reviewer PDF  
(for New and revised Submissions)

# Simplify Submission Process

Some publications want to simplify the submission process for staff as well!

Currently when “Tech Check” is configured, it must be performed on new submissions. This can be a waste of resources if the paper is likely to be rejected early in the process.

**Solution: Allow different levels of Tech Check at initial submission and revision; and to even delay Tech Check until the author submits a revision.**

# Simplify Submission Process

Create different Tech Check checklists that can be applied to different Article Types.

Apply different Tech Check checklists to either or both New Submissions and Revised Submissions.

The screenshot displays a configuration interface for submission processes. At the top, there is an 'Add' button. Below it is a table with two columns: 'Checklist' and 'Actions'. The table lists four checklists: 'Light Tech Check for New Papers', 'Robust Tech Check for Revisions', 'List for Special Articles', and 'List for something else'. The 'List for Special Articles' row has a 'Remove' button. Below the table is a link for 'Old Tech Check List'. Below the table, there are three checkboxes: 'Send Reviewer PDF on Initial Submission', 'Send Reviewer PDF on First Revision', and 'Send Reviewer PDF on Final Disposition to Accept'. The 'Duplicate Submission Check' is checked and labeled 'Check for duplicate submissions to Editorial Manager'. Below this, there are two dropdown menus: 'New Submission' (set to 'List 1') and 'Revised Submission' (set to 'None'). At the bottom, there is a section for 'Author Parameters'.

Checklist	Actions
Light Tech Check for New Papers	Edit
Robust Tech Check for Revisions	Edit
List for Special Articles	Remove Edit
List for something else	Edit

[Old Tech Check List](#)

Send Reviewer PDF on Initial Submission

Send Reviewer PDF on First Revision

Send Reviewer PDF on Final Disposition to Accept

**Duplicate Submission Check:**  Check for duplicate submissions to Editorial Manager

**Technical Check Checklist:**

New Submission:

Revised Submission:

**Author Parameters**

# Discrete Affiliations – Xtract, etc.

Authors and co-authors often have multiple affiliations (e.g., an academic position at a university and a medical residency at a hospital).

These will be stored as separate entities.

The screenshot shows a software interface for managing author information. On the left, a sidebar contains navigation options: 'ch Files', 'General Information', and 'Review Preferences', each with a green checkmark icon. Below these are expandable sections for '+ Title', '+ Abstract', and '- Authors'. A note states: 'You may reorder the authors by dragging and dropping them to the correct position in the Current Author List.' The 'Current Author List' contains three entries:

Current Author List	
	<b>Chang-Yong Kim</b> <i>Department of Health Science, the University, Seoul, Republic of Korea</i>
	<b>Jung-Sun Lee</b> <i>Department of Epidemiology and H... Public Health, Korea University, Se... Health Science, the Graduat...</i>
	<b>Hyeong-Dong Kim</b> <i>Department of Physical Therapy, College of Health Science, Korea</i>

The main window is titled 'Edit Author Details' and shows the details for 'Jung-Sun Lee'. It includes fields for 'Given/First Name\*' (Jung-Sun), 'Family/Last Name\*' (Lee), 'E-mail Address\*' (lee@mailinator.com), and 'Contributor Roles'. Two 'Affiliation' fields are highlighted with a yellow rounded rectangle, each with a red circular arrow icon pointing to the 'Institution' field below it. The first affiliation is 'Department of Epidemiology and Health Informatics, The Graduate School of Public Health, Korea University, Seoul, Republic of Korea' with institution 'Korea University'. The second affiliation is 'Department of Health Science, the Graduate School, Dongduk Women's University, Seoul, Republic of Korea' with institution 'Dongduk Women's University'. There are also checkboxes for 'This is the corresponding author' and 'Equal Contribution Status'.

# APIs and Web Services

Customers have:

- Preferred technology partners
- Third party services
- In-house tech and products
- Vendors

APIs – allow integration with other systems in a generic and non-proprietary way



# Aries historic approach

**Aries has several APIs** – purpose-built, created to interact with a third party system, or workflow purpose, such as Ingest, payment systems, repository deposit.

**Aries has a general purpose API** – webhooks deliver messages to endpoints as events occur; publication sends request and results are sent.

## Going forward

**Increase number and flexibility of general APIs** – different services and systems require different types of APIs; workflow and integration points must be considered.

# AI Integration

**Manuscript evaluation tools** that use advanced machine intelligence and natural-language understanding to help assess quality by examining the structure, declarations, statistics, referencing, and other manuscript elements.

API allows passing of metadata and files to a third-party service, that service can then return a report, a link to a report, and a set of scores that can be displayed in the EM/PM user interface.

# AI Integration



SciScore – SciCrunch – research resource identifier



Access Innovations – taxonomy



UnsiLO – manuscript QA



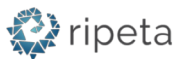
Penelope.ai – manuscript QA



Ada – Editage – manuscript QA



Scholarcy – manuscript summary and QA



Ripeta – reproducibility assessment



Lpixel - image manipulation detection



Proofig – image manipulation detection



Urkund – plagiarism detection

# Conflict of Interest

Convey is a global disclosure system developed by the Association of American Medical Colleges (AAMC) that allows publishers and societies to store conflict of interest disclosure information for authors and other members.

Publications that have an agreement with Convey are able to use this system to set up and tailor their COI policy requirements, creating a series of forms and questionnaires within the Convey interface that will be presented to users.

<http://www.convey.org>



# Conflict of Interest

Possible COI integration – either Editors and Reviewers to the COI or pull COI data into EM.

<b>Additional Manuscript Details:</b>	<a href="#">Add/Edit Additional Manuscript Details</a>
<b>Corresponding Author:</b>	Duncan James Webber, Ariess Systems North Andover, MA UNITED STATES
<b>Corresponding Author E-Mail:</b>	mdinatale@ariessys.com
<b>Author Comments:</b>	
<b>Short Title:</b>	sdfsdf
<b>Article Type:</b>	Original Study
<b>Section/Category:</b>	
<b>Keywords:</b>	dsfsdfsdf
<b>Classifications:</b>	This manuscript does not have any Classifications
<b>Requested Editor:</b>	
<b>Technical Check:</b>	<a href="#">View Technical Check Information</a>
<b>Conflict of Interest:</b>	<a href="#">View COI Disclosure</a>
<b>Initial Date Submitted:</b>	Jun 14 2014 02:10PM
<b>Editorial Status Date:</b>	Nov 16 2015 05:57PM
<b>Current Editorial Status:</b>	Under Peer Review
<b>Submission Target Publication Date:</b>	<input type="text"/> (mm/dd/yyyy)

**Conflict of Interest Disclosures for Manuscript Number: MIKETEST131-D-16-03143 "Hydrogen Sulfide Delays LPS-induced Preterm Birth in Mice via Anti-inflammatory Pathways"**

Close

All available Conflict of Interest disclosure information is displayed below. You may use the "Request Updated COI Data" to request more recent data.

Request Updated COI Data Last Updated 2/22/16 12:30:12 PM Expand all / Collapse All

**Authors**

- Horace Williamson**  
University of Massachusetts  
hwilliamson@umass.edu  
**Employment**  
Company Name: pfizer - Recipient: An Immediate Family Member  
Company Name: Genzyme - Recipient: An Immediate Family Member  
Company Name: GeneInsight - Recipient: An Immediate Family Member  
**Stock and Other Ownership Interests**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Honoraria**  
Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member  
Boston University  
hwilliamson@bu.edu  
**Employment**  
Company Name: pfizer - Recipient: An Immediate Family Member  
**Stock and Other Ownership Interests**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Honoraria**  
Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member
- D.D. Ramone**  
deedee@cbgb.nyc  
**No information available**
- J. Thunders**  
New York University  
jthunders@nyu.edu
- Myra Gillian**  
University of Massachusetts  
mgillian@umass.edu  
**Employment**  
Company Name: pfizer - Recipient: An Immediate Family Member  
Company Name: Genzyme - Recipient: An Immediate Family Member  
**Stock and Other Ownership Interests**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Honoraria**  
Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member  
**Consulting or Advisory**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Speakers' Bureau**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Patents, Royalties**  
Company Name: Wellcare - Recipient: Horace Williamson

**Reviewers**

- Peter Perrett**  
University of Massachusetts  
pperrett@umass.edu  
**Employment**  
Company Name: pfizer - Recipient: An Immediate Family Member  
Company Name: Genzyme - Recipient: An Immediate Family Member  
**Stock and Other Ownership Interests**  
Company Name: Wellcare - Recipient: Horace Williamson  
**Honoraria**  
Company Name: Pfizer - Recipient: Horace Williamson  
Company Name: Celera - Recipient: An Immediate Family Member
- Kimberly Deal**  
kimberlydeal@daton.com  
**No information available**

# Other API Integrations



## Reviewer Finder

- ProQuest/Pivot\*
- Publons
- UnsiLO



APTARA

## APC Payment System

- CCC/RightsLink\*
- Aptara

\* EXISTING

# Batch Functions

- **Batch Editor Assignment** – assign multiple submissions to a single Editor
- **Article Type Configuration** – make changes across multiple Article Types
- **Batch Task Assignment**– assign multiple Editorial Tasks at once\*
- **Set Final Disposition** – set the Final Disposition for multiple submissions\*
- **Turn On and Turn Off Flags** – enable or disable flags on multiple submission\*
- **Submission Item Configuration** – make changes across multiple items
- **Task Configuration** – make changes across multiple tasks
- **Role Configuration** – change configurations across multiple sub-roles

\* NEXT

# Batch Task Assignment

Editorial Tasks can be assigned prior to Final Disposition, without initiating production on a submission.

Batch Task assignment (similar to Production Tasks) will allow the assignment of multiple Editorial Tasks to a single person at once.

### Batch Assign Task

Select the **task** you wish to assign. After the task is selected, a list of people who can be assigned to the task will appear. The table of selected submissions will confirm which submissions are valid for assignment under your choices.

**Task:**

**Task Assigned to:**

#### Submissions Selected for Assignment

Action	Manuscript Number	DOI	Author Name	Article Title	Article Type	Section/Category	Production Status
History	CAROLINETEST40-D-05-00041R1	10.11260150021	Amy S Author (UNITED STATES)	Submitting a new MS - deep links test?	Main Testing Article		Not In Production
History	CAROLINETEST71-D-09-00001R1	10.11260150004	Adrian Author (UNITED STATES))	lklkjdfkjsdlfjksdlfkj	Editorial		Not In Production
History	CAROLINETEST80-D-10-00003	10.1126.0150003	Go Eric Jr. Ishiwata (JAPAN)	This is my full title	Main Testing Article		Not In Production



# Batch Task Assignment

The assigner will see all of the submissions getting batch assigned, and will be able to customize a single letter to be sent to the assignee listing all of the assignments.

### Batch Assign Task

**Task:** Copy Edit

**Task Assigned To:** Ed J Editor/EIC - restricted admin

**Due Dates:**

Submission	Article Type	Target Number of Pages	Black and White Image Count	Color Image Count	Due Date (mm/dd/yyyy)
CAROLINETEST40-D-05-00041R1 Amy S Author(UNITED STATES)Submitting a new MS - deep links test?	Main Testing Article				02/06/2019
CAROLINETEST71-D-09-00001R1 Anthony Author (UNITED STATES) lklkjdfkjsdlfkjsdlfkj	Editorial				02/06/2019
CAROLINETEST80-D-10-00003 Go Eric Jr. Ishiwata(JAPAN)This is my full title	Main Testing Article				02/06/2019

**Batch Assignment Letter:**

**From:** "Dmitri Khodjakov" <dkhodjakov2@ariessys.com>

**To:** **Tim Taskperformer**

**Letter Purpose:**

**Letter Subject:**

# Set Final Disposition

Be able to set the Final Disposition for multiple submissions at once.

The screenshot shows the Editorial Manager interface. At the top, there is a navigation bar with the logo and menu items: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, INSTRUCTIONS FOR AUTHORS. The user is logged in as 'lauren' with the role of 'Managing Editor'. A red banner at the top reads: 'Important Message: Site under development. Do not use for live manuscript submission.' Below this is a 'Quicklinks' section. The main content area is titled 'Search Submissions - Search Results' and contains a table of submissions. A modal dialog titled 'Set Final Disposition for Selected Submissions' is open, allowing the user to select a final disposition for the selected submissions. The dialog includes a dropdown menu with options 'Reject' and 'Withdrawn', and 'Cancel' and 'Proceed' buttons. The table below the dialog shows several rows of submission data, with the first three rows highlighted in yellow, indicating they are selected.

em Editorial Manager™

HOME • LOGOUT • HELP • REGISTER • UPDATE MY INFORMATION • JOURNAL OVERVIEW  
MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Go to: -- Search Page --  
Role: Managing Editor Username: lauren

**Important Message: Site under development. Do not use for live manuscript submission.**

Quicklinks

### Search Submissions - Search Results

Sed rutrum nulla non eros euismod

Set Final Disposition for Selected Submissions

Page: 1 of 1 (156 total submissions)

Select	Action	Manuscript N			
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15			st #2
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15			ases #5
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV15			st #1
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00105	Humbert Humbert UNITED STATES	Wonky Production Workflow #1	
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00106	Humbert Humbert UNITED STATES	Wonky Production Workflow #2	
<input checked="" type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00107	Humbert Humbert UNITED STATES	Wonky Production Workflow #3	
<input type="checkbox"/>	<a href="#">Action Links</a>	LAURENDEV151-D-18-00102	Humbert Humbert UNITED STATES	Snelle submissie #4	

#### Set Final Disposition for Selected Submissions

Select the Final Disposition term for the selected submissions. Setting the Final Disposition will complete any peer-review processes in progress for the selected submissions.

Final Disposition:

# Flags

Turn On and Turn Off  
Flags – be able to  
enable or disable flags  
on multiple submission  
at once

The screenshot displays the Editorial Manager interface. At the top, there is a navigation bar with links for HOME, LOGOUT, HELP, REGISTER, MAIN MENU, CONTACT US, and SUBMIT. Below this is a red banner for an 'Important Message: Si' and a 'Quicklinks' button. The main content area shows a 'Set Flags for Selected Submissions' dialog box. The dialog box contains a text area with placeholder text and two 'Submit' buttons. Below the text area is a table with columns for 'Flag Options', 'Flag', and 'Flag Name'. The table lists seven different flag options, each with a radio button for 'No Change', 'Display Flag for Selected Submissions', or 'Remove Flag from Selected Submissions'. The flags are represented by various icons: a Euro symbol, a heart, a speech bubble, a gear, a red square, a blue square, and a purple square.

Flag Options	Flag	Flag Name
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	€	Goudmijntje
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	♥	Lief artikeltje
<input checked="" type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	🗨️	De beller is sneller
<input checked="" type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	⚙️	Flag associated with an AMD field
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is red
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is blue
<input type="radio"/> No Change <input type="radio"/> Display Flag for Selected Submissions <input type="radio"/> Remove Flag from Selected Submissions	■	My parachute is lavender

# Page Anchors

To improve user experience, buttons and links returning the user to the parent page are now enhanced with anchors to return focus to the last item that was being viewed in the following locations:

Links returning to the *Search Submissions – Search Results* page

Links returning to the *Search Proposals – Search Results* page

Links returning to the PolicyManager parent pages:

- *Edit Letters*
- *Create Custom Questions*
- *Edit Article Types*
- *Create Registration Questions*
- *Add/Edit Additional People Detail Fields*
- *Add/Edit Additional Manuscript Detail Fields*
- *Add/Edit Additional Schedule Group Detail Fields*

# Page Anchors

1 The user scrolls to the **bottom** of the *Search Submissions* page and clicks 'Linked Submissions'.

**Search Submissions - Search Results**  
Manuscript Number is containing 'test'

Page: 1 of 461 (4606 total submissions)

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Key Words
Action Links	TEST161-50	mary mary	Papillary fibroelastoma of a mitral valve chordae - case report .	Original Article		
Action Links	TEST161-51	Nick Paolini	Testing 20 values on a checkbox	Original Article		
Action Links	TEST161-52	Nick Paolini	Testing custom question w/ 21 values	Original Article		
Action Links	TEST161-53	mary mary	adfsdf	Original Article		
Action Links	NICKDEV161-D-19-00064	Nick Paolini	NP Test w/ Early CTA demo	NP Test		
Action Links	NICKDEV161-D-19-00063	Nick Paolini	CTA early demo test np	NP Test		
Action Links	NICKDEV161-D-19-00062	mary mary	Papillary fibroelastoma of a mitral valve chordae - case report.	Original Article		

2 The user visits the *Add to/Create Linked Submission Group* (child) page and clicks 'Cancel'.

**Add to/Create Linked Submission Group**

A submission may be added to an existing Linked Submission Group, or added as the first submission in a new created Linked Submission Group.

**To add the submission to an existing Linked Submission Group**

Please select a Linked Submission Group from the drop-down below and click the Add to Group button. Note: A submission can only belong to one Letter to the Editor Group.

Please select a Linked Submission Group:  Add to Group

**To create a new Linked Submission Group**

Click the 'Create a New Group' button to create a new Linked Submission Group that you can add your referring submission to.

Once created, the new Linked Submission Group will be selected by default in the drop-down menu above. Clicking the 'Add to Group' button will then add the referring submission to the newly created group.

Create a New Group

Cancel

3 The user is returned to the *Search Grid* and the manuscript that was edited is at the top of the scrolling viewport.

**Search Submissions - Search Results**  
Manuscript Number is containing 'test'

Page: 1 of 461 (4606 total submissions)

Action	Manuscript Number	Author Name	Article Title	Article Type	Short Title	Key Words
Action Links	TEST161-52	Nick Paolini	Testing custom question w/ 21 values	Original Article		
Action Links	TEST161-53	mary mary	adfsdf	Original Article		
Action Links	NICKDEV161-D-19-00064	Nick Paolini	NP Test w/ Early CTA demo	NP Test		
Action Links	NICKDEV161-D-19-00063	Nick Paolini	CTA early demo test np	NP Test		
Action Links	NICKDEV161-D-19-00062	mary mary	Papillary fibroelastoma of a mitral valve chordae - case report.	Original Article		



# LiXuid Manuscript™

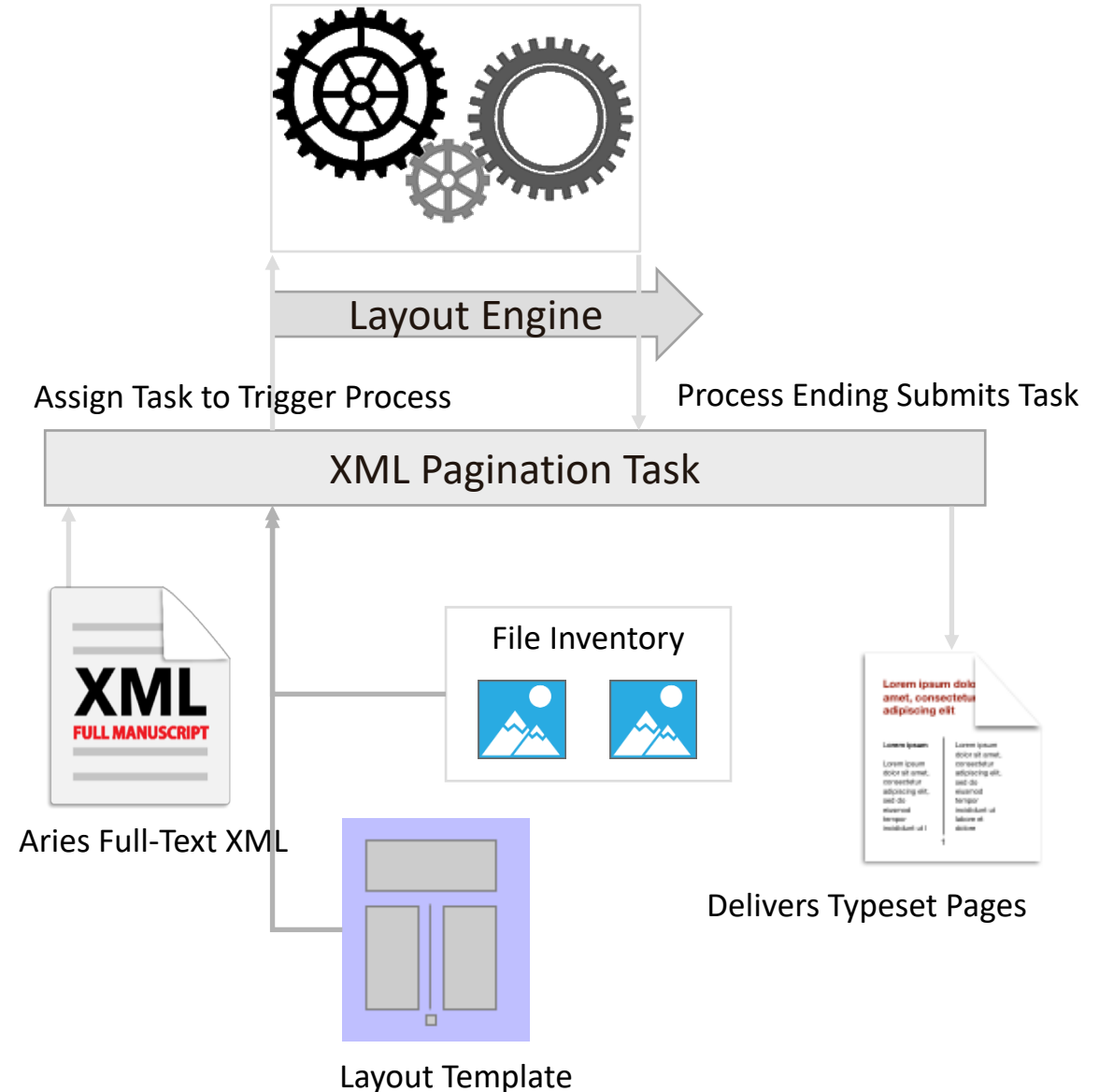
## XML Workflow

### Phased Development and Release Plan

- Phase 2B: More Production-focused XML tools
- Phase 3: Moving XML into the peer review workflow

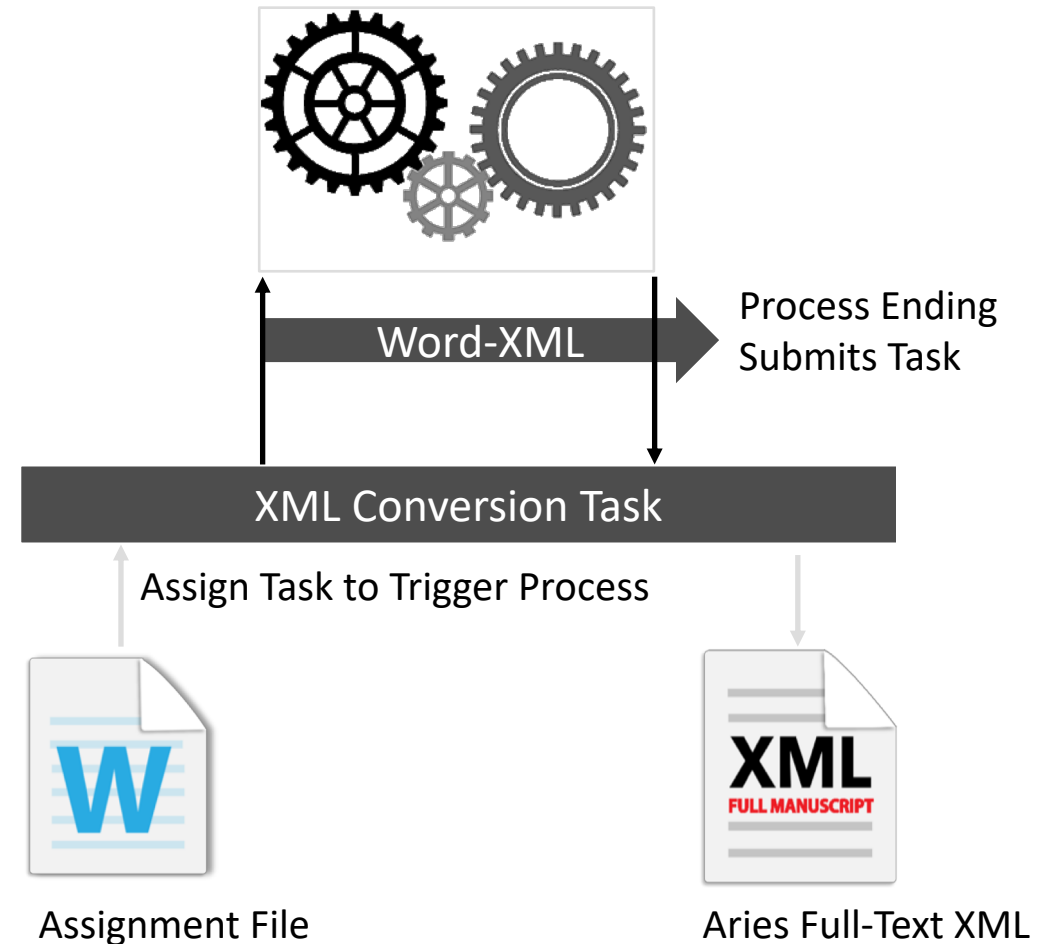
# 'Pagination' Tasks

- We will integrate a layout/pagination engine
- Will reformat and layout XML for delivery
  - E.g. Print, PDF
- Based on customer layout templates
- Solo task for a single submission...



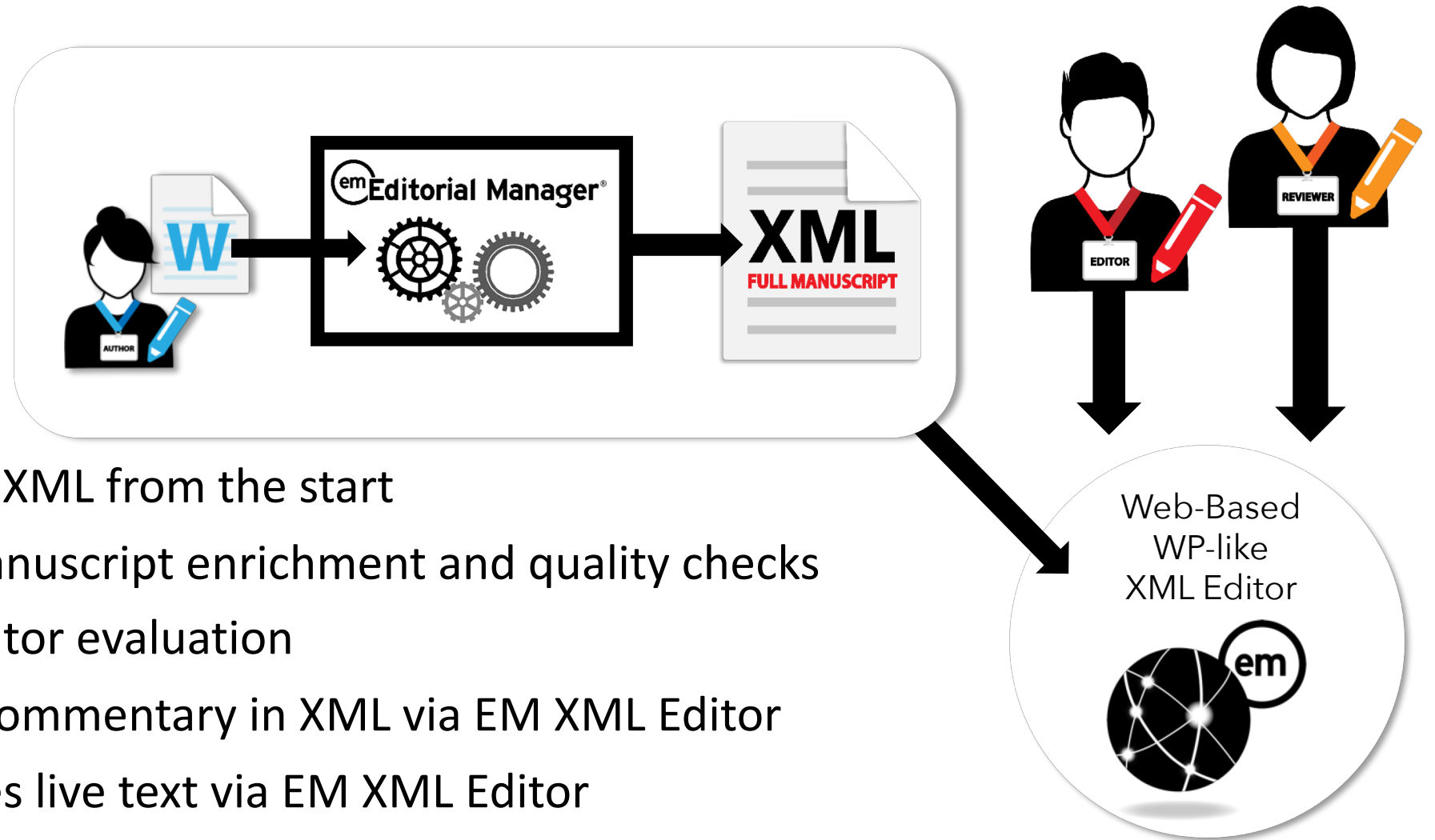
# Full-Text Conversion Task

- Takes a document to convert as the Assignment File
- Software **automatically** converts document to structured XML
  - No template needed
  - Heuristics to deconstruct files with a variety of structures
- On completion of the process, EM/PM automatically “submits the Task”



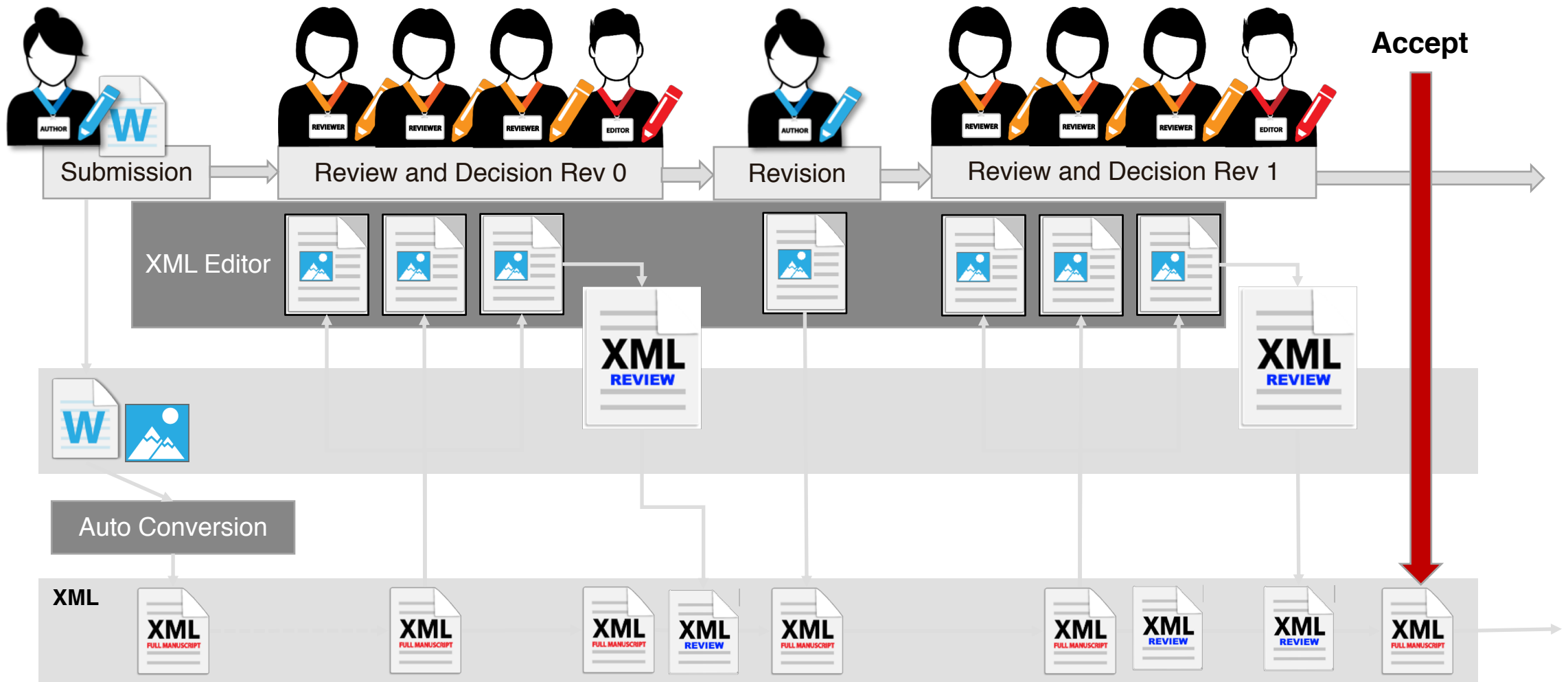


# Phase 3 – Full-Text Conversion on Submission



- Structured text in JATS XML from the start
- Apply AI to assist in manuscript enrichment and quality checks
- Apply AI to assist in Editor evaluation
- Capture Peer-Review commentary in XML via EM XML Editor
- Revision process refines live text via EM XML Editor
- Accepted text is ready to go

# Allowing: XML-First in Editorial



# Short-listed

Items being considered for later in 2020 and 2021

TENTATIVE AND SUBJECT TO CHANGE

# Shortcuts for Editors and Editorial Staff

**Request and Grant/Deny Due Date Extensions** – mechanism for Authors and Reviewers to request a due date extension, and for Editors and staff to grant or deny the extension

**New Reviewer Invitation**

You have been invited to review the following article:

**Request Extension**

Thank you for your time in considering this invitation. Below, please enter the date by which you will be able to submit your review. Your request for a deadline extension will be reviewed by the Journal Office, who will determine if the extension can be granted.

**Requested Due Date:**  (mm/dd/yyyy)

Please provide your reason for requesting an extension (optional):

**Action**

- View Abstract
- Agree to Review
- Agree and Request**
- Decline to Review
- Send E-mail
- View Abstract

Send E-mail

View Submission

# Shortcuts for Editors and Editorial Staff

**Removing Role Shortcuts** – easy access to close out open Editor assignments instead of hunting down each assignment that prevents the role change or people record inactivation

The screenshot shows the Editorial Manager web interface. At the top, there is a navigation bar with the 'em Editorial Manager' logo and a menu of links: HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. To the right of the navigation bar, there is a search box labeled 'Go to: -- Search Page --' and a dropdown menu for 'Role: Managing Editor' with the 'Username: lauren' displayed next to it.

A prominent red banner across the top of the main content area contains the text: **Important Message: Site under development. Do not use for live manuscript submission.**

The main content area is divided into two columns. The left column contains the heading **Cannot save changes to Editor Role**. The right column contains a message: **This is the only user assigned to the Editor role configured in PolicyManager to receive Request for Removal notifications. The Editor role must be removed on the Privacy Policy Configuration page, or at least one other person must be assigned to the role, before this user's Editor role can be removed.**

Below this message, there is a section titled **This user created one or more automated reminder reports:**

- Automated Reviewer Reminder: Pippa's automated reviewer reminder report
- Automated Author Reminder: Pippa's automated author reminder report

Below this section, there is a message: **Any automated reminder reports that this user created as an Editor must be deleted before the Editor role can be removed.**

Below this message, there is a section titled **One or more submissions are still associated with this user:**

- LAURENDEV151-D-18-00066: Editor is part of a Suggested Editor Queue
- LAURENDEV151-D-18-00069: Editor is part of the assignment chain
- LAURENDEV151-D-18-00074: Editor is part of the assignment chain
- LAURENDEV151-D-18-00087: Editor has an outstanding invitation
- LAURENDEV151-D-18-00089: Editor is editing this submission

# Shortcuts for Editors and Editorial Staff

## Article Type Specific Recommendation Terms – Ability to define a list of Reviewer Recommendation and Editor Decision Terms by Article Type

The screenshot displays the Editorial Manager interface for a Managing Editor. The top navigation bar includes the 'em Editorial Manager' logo, a breadcrumb trail (ROLEMANAGER • ACTIONMANAGER • POLICYMANAGER • ADMINMANAGER • ADMINISTRATION HELP), and the user's role and username (Role: Managing Editor Username: lauren). The main content area is divided into several sections:

- Automatically Promote Alternate Reviewers:** A checkbox is checked.
- Only Promote unlinked Alternate Reviewers with MATCHING Roles:** A checkbox is checked.
- Promotion Options:** Two radio buttons are present: 'Continue promoting Alternates until there are no more Alternates in queue' (selected) and 'Only promote Alternate Reviewers when the combined number of Agreed and Completed Reviews is less than the current value of the Submission's own 'Required Reviews Complete' value'.
- Days to Review This Article Type:** A text input field contains the value '14'.
- Reviewer Recommendation Terms:** Two dropdown menus are shown for 'New Submission' and 'Revised Submission'. Both are set to '14' days. The dropdown lists include: Accept, Conditional Accept, Minor Revision, Major Revision, Reject, Statistically Invalid, Methodologically Invalid, Conceptually Invalid, and Out of Scope. A pink note states: 'The Reviewer Recommendation Terms selected will be presented to reviewers submitting a review for this Article Type.'
- PDF Cover Page Layout:** Two dropdown menus are shown: 'Editor\Author Version' (set to 'Editor/Author Layout 001') and 'Reviewer Version' (set to 'Reviewer Layout 001').
- Article Type Parameters:** Two dropdown menus are shown for 'New Submission' and 'Revised Submission', both currently set to 'Hidden'.

Additional text on the right side of the interface reads: 'Select this box to automatically invite the next available Alternate Reviewer when a main Reviewer declines, is un-invited, or un-assigned. Select this box to only Promote unlinked Alternate Reviewers with MATCHING Reviewer Roles.'

# Cross-Publication Functionality

Editorial Manager and ProduXion Manager: 1 journal = 1 EM site

**Extend “Enterprise View”** – into the rest of PM and EM

**Article Type Configuration** – create Article Types or change configurations across multiple EM sites at once

**Submission Item Configuration** – create Submission Items or change configurations across multiple EM sites at once

**Production Task Configuration** – create Tasks or change configurations across multiple EM/PM sites at once

**Role Configuration** – create Editor and Reviewer roles or change configurations across multiple EM/PM sites at once

# Letter/Email Improvements

**Attachments** – configure standard file attachments so that when the letter is sent from EM the attachment will automatically be included

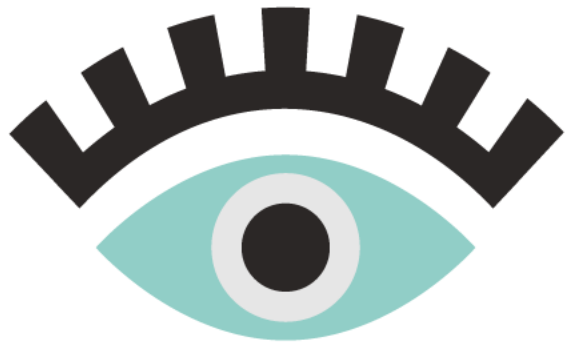
**“High Importance” designation** – allow emails to be designated as High Importance on a template level and ad hoc when sending

## Reminder Letter Enhancements

**Configure Reminder Letters to Send by Intervals** – instead of setting up multiple reports with different due dates, configure a single report the sends reminders at intervals, e.g., after 1 day, 5 days and 10 days

**Auto-reminders for Co-Authors** – automated reminders to co-authors for verification, verify and register, and completing questionnaires





# QUESTIONS?

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